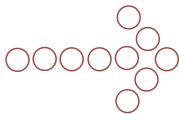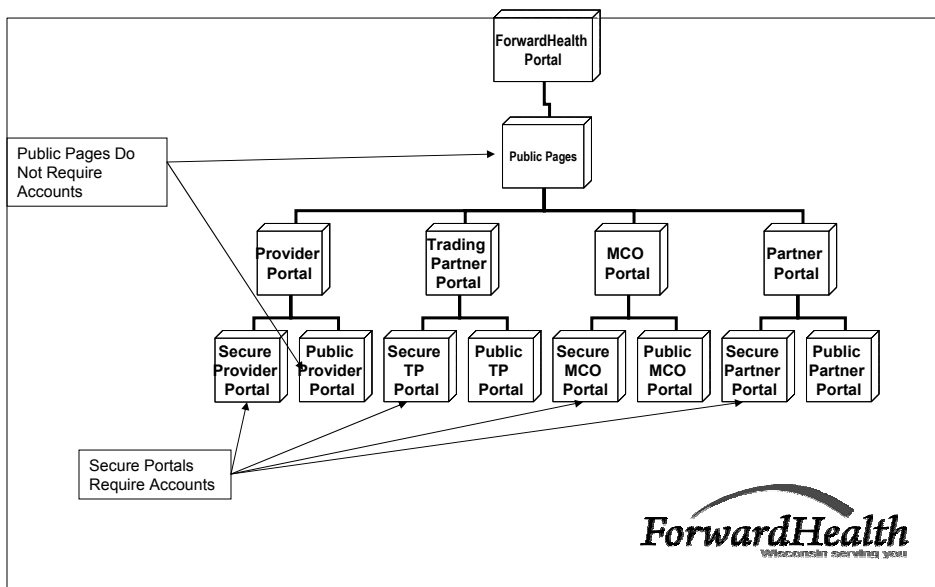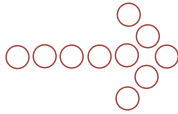*ForwardHealth*
Wisconsin serving you

ForwardHealth interChange
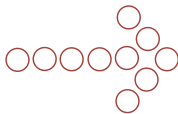# Portal Account Set-Up

August 2008

ForwardHealth interChange
ForwardHealth Portal Structure

ForwardHealth Portal

Public Pages

Public Pages Do Not Require Accounts

| Provider Portal | Trading Partner Portal | MCO Portal | Partner Portal |

| Secure Provider Portal | Public Provider Portal | Secure TP Portal | Public TP Portal | Secure MCO Portal | Public MCO Portal | Secure Partner Portal | Public Partner Portal |

Secure Portals Require Accounts

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## Which portal do I use?

- Providers will always use the Provider Portal.
- Trading Partners will always use the Trading Partner Portal.
- Providers who are also Trading Partners will use both the Trading Partner Portal and the Provider Portal.
- Managed Care Organizations* will always use the MCO Portal.
- Partners* will always use the Partner Portal.

    – Some MCOs and Partners may also use other Portals, depending on the function they are performing.

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ForwardHealth interChange
Checklist for healthcare provider portal account set-up

- What Portals Need Accounts?
    – All Portals require that an account be established to access secure information.
- If I use multiple Portals, will my account request process be the same?
    – No. Because the functionality in each Portal is different, we will need specific information when you request your account to ensure you will be able to use all the functions in that particular portal successfully.

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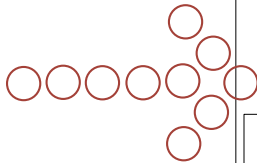
Planning your Provider Portal Account Set-up

August 2008
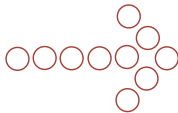
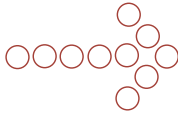## Health Care Providers: Checklist for Provider Portal Account Set-Up

Health Care Providers Must:

1. Obtain an NPI from NPPES and report that NPI to ForwardHealth.
2. Know the taxonomy designated to you by ForwardHealth (NOT necessarily the Taxonomy you registered with NPPES).

   IMPORTANT!! When doing business with ForwardHealth you must ALWAYS use the taxonomy designated to you, even though it may be different than the one you submitted to NPPES.
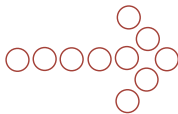
3. Determine how many times you are certified (or "on file") with ForwardHealth. Be sure to include all financial payers (Medicaid, WCDP, WWWP).
4. Collect the NPI, designated taxonomy, ZIP+4, financial payer, and the SSN or TIN related to each certification you noted in #3.
5. Appoint an Administrator for your account.
6. Have your Administrator request a Portal Account.
7. Have your Administrator establish the Portal Account and set up user accounts.

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Exceptions for Some Health Care Providers…

- Certain providers are currently being contacted to determine how they would like to be represented "on file" with ForwardHealth.

- The number of Provider Portal Accounts needed for these agencies will be determined based on the outcome of these discussions.

- These providers are:
  - Providers who are currently certified for **both** Targeted Case Management and PNCC (Prenatal Care Coordination) **at the same location**.

  - Providers who are currently certified for **all** of the following **at the same location**:
    - Crisis Intervention
    - CCS (Comprehensive Community Service)
    - CSP (Community Support Program)

  - Providers who are currently certified for **both** Adult Mental Health Day Treatment and Substance Abuse Day Treatment **at the same location**.
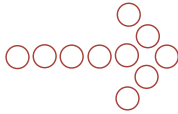
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Non-Health Care Providers*: Checklist for Provider Portal Account Set-Up

Non-Health Care providers* must:

1. Determine how many times you are certified (or "on file") with ForwardHealth. Be sure to include all financial payers (Medicaid, WCDP, WWWP).

2. Collect the Provider ID, Financial Payer, and SSN or TIN for each certification.

3. Appoint an Administrator for your account.

4. Have your Administrator request a Portal Account.

5. Have your Administrator establish the Portal Account and set up user accounts as appropriate.

Non-Health Care Providers are: SMVs, Personal Care Only Agencies, Community Care Organizations, and Blood Banks.

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## Why is all of this information Needed Just for an Account?

• ForwardHealth uses your unique provider information to match to our current files. In doing this we can ensure the security of your account and the data in it.

• Many of the features of the Portal use this information to process claims, PA's, and other transactions that you perform when using the Portal. This provides several benefits:

   – You do not have to repeatedly enter in your information for every transaction – the information is automatically populated based on how you   logged in to the Portal.

   – The information is used in providing instant feedback to you while using the Portal to make sure that your transactions get completed accurately.

   – The information is used to speed processing.

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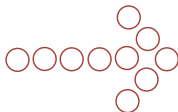
Provider Portal Account Requirements
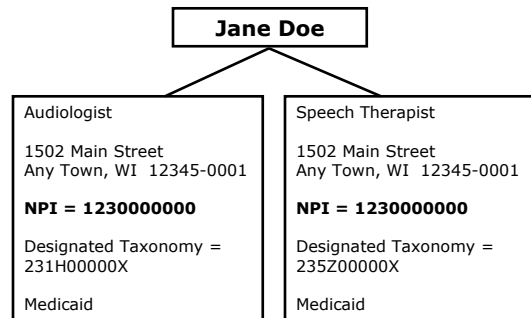
• Accounts are based on your ForwardHealth Certification.

• If you are a Health Care Provider, you must use your NPI to request your Portal account.

• If you are a Non-Health Care Provider (i.e., you do not have an NPI), you must use the Provider Number assigned to you by the program (financial payer) to request your Portal account.

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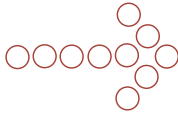
Provider Portal Account Example 1: An Individual Provider

Jane Doe is an individual provider certified with ForwardHealth. She is certified with Medicaid to provide both audiology and speech language pathology services to Medicaid and BadgerCare Plus members.
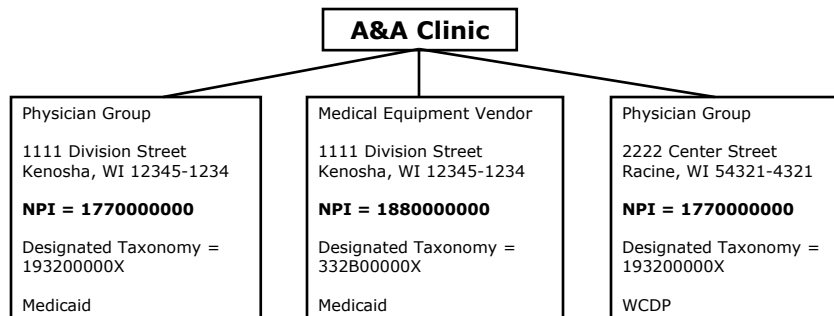
Jane Doe

Audiologist	Speech Therapist
1502 Main Street Any Town, WI 12345-0001	1502 Main Street Any Town, WI 12345-0001
NPI = 1230000000	**NPI = 1230000000**
Designated Taxonomy = 231H00000X	Designated Taxonomy = 235Z00000X
Medicaid	Medicaid

Jane will need two (2) Portal Accounts – one for Audiology and one for Speech Therapy.
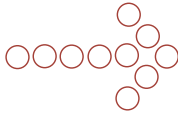
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Provider Portal Account Example 2: Organization Provider

A&A Clinic is a certified provider of Medicaid and WCDP. They have three (3) certifications: 1) Physician Group for Medicaid 2) Physician Group for WCDP, and 3) Medical Equipment Vendor for Medicaid.

A&A Clinic

Physician Group	Medical Equipment Vendor	Physician Group
1111 Division Street Kenosha, WI 12345-1234	1111 Division Street Kenosha, WI 12345-1234	2222 Center Street Racine, WI 54321-4321
NPI = 1770000000	**NPI = 1880000000**	**NPI = 1770000000**
Designated Taxonomy = 193200000X	Designated Taxonomy = 332B00000X	Designated Taxonomy = 193200000X
Medicaid	Medicaid	WCDP

A&A Clinic will need three (3) Portal Accounts – one for each of their certifications.
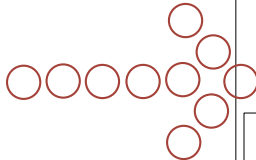
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Provider Portal Account Example 3: Organization Provider

Clark Hospital is a certified provider for Medicaid, WCDP, and WWWP. They have one (1) location which provides Hospital Outpatient and Ambulance services for Medicaid and WCDP. They are only certified for Hospital Outpatient with WWWP (no Ambulance). Clark Hospital has five (5) certifications on file with ForwardHealth.

Clark Hospital

Hospital	Hospital	Hospital
NPI = 1770000000	**NPI = 1770000000**	**NPI = 1770000000**
Designated Taxonomy = 282N00000X	Designated Taxonomy = 282N00000X	Designated Taxonomy = 282N00000X
Medicaid	WCDP	WWWP

Ambulance	Ambulance
NPI = 1880000000	**NPI = 1880000000**
Designated Taxonomy = 3416L0300X	Designated Taxonomy = 3416L0300X
Medicaid	WCDP
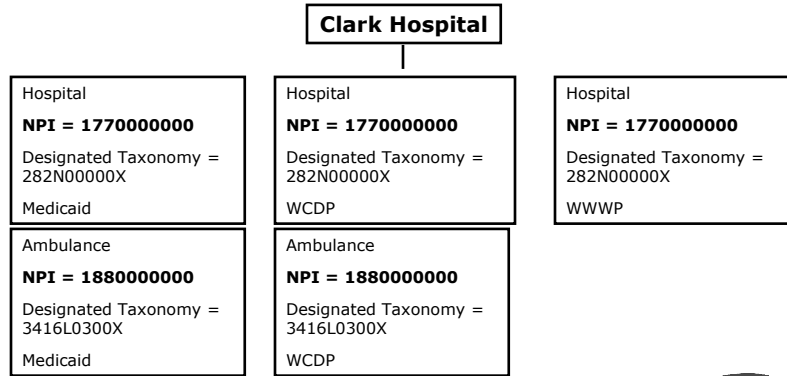
Clark Hospital will need five (5) Portal Accounts – one for each certification.

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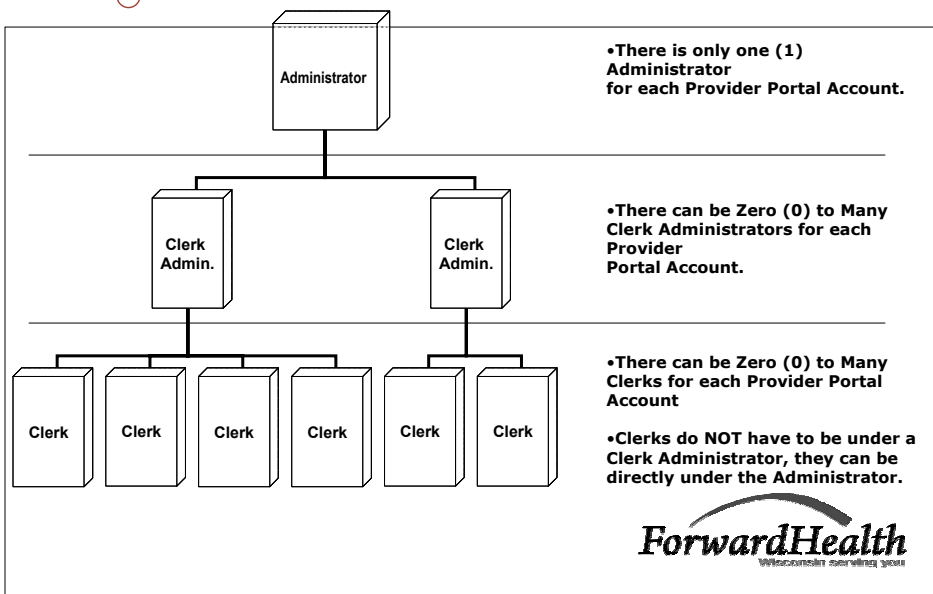
Portal Accounts & Portal User Accounts

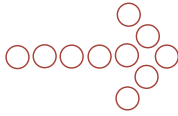August 2008
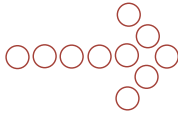
Portal Accounts & Users

- A "Provider Portal Account" includes all the users assigned to that Account.

- There are three (3) types/levels of Portal Users:
  1. The Administrator (required)
  2. The Clerk Administrator (optional)
  3. The Clerk (optional)

- Clerk Administrators and Clerks must be granted permissions to one or more of the following functions:

  1. Prior Authorizations
  2. Enrollment Verification
  3. Claims Submission
  4. WWWP Claims Submission
  5. 835 Designation
  6. Demographic Maintenance
  7. HealthCheck
  8. Hospice

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Provider Portal Account Structure

Administrator

Clerk Admin.

Clerk Admin.

Clerk   Clerk   Clerk   Clerk   Clerk   Clerk

- **There is only one (1) Administrator for each Provider Portal Account.**

- **There can be Zero (0) to Many Clerk Administrators for each Provider Portal Account.**

- **There can be Zero (0) to Many Clerks for each Provider Portal Account**

- **Clerks do NOT have to be under a Clerk Administrator, they can be directly under the Administrator.**

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The Administrator Account

- There is only one Administrator for each Provider Portal Account*.

- The Administrator is responsible for adding, modifying and removing any user accounts under them. This helps to ensure the integrity of the Provider Portal Account*.

- Administrators always have access to everything for that Provider Portal Account*.

   *Remember: A "Provider Portal Account" includes the Administrator _and_ all Clerk Administrators and Clerks associated to that Account.

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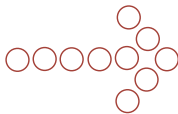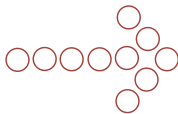
The Clerk Administrator Account

- The Administrator may choose to set up zero (0) or many Clerk Administrators.

- Clerk Administrator accounts relieve some of the administrative burden on the Administrator by delegating the authority for adding/modifying/removing clerks to the Clerk Administrator.

- The Administrator may grant permissions to one or many functions in the Provider Portal (i.e., Claims, PA, Enrollment Verification, etc.) to a Clerk Administrator.

- Clerk Administrators can only grant permissions to others that they, themselves, have. (For example, a clerk administrator must have permissions for claims in order to grant permissions for claims).
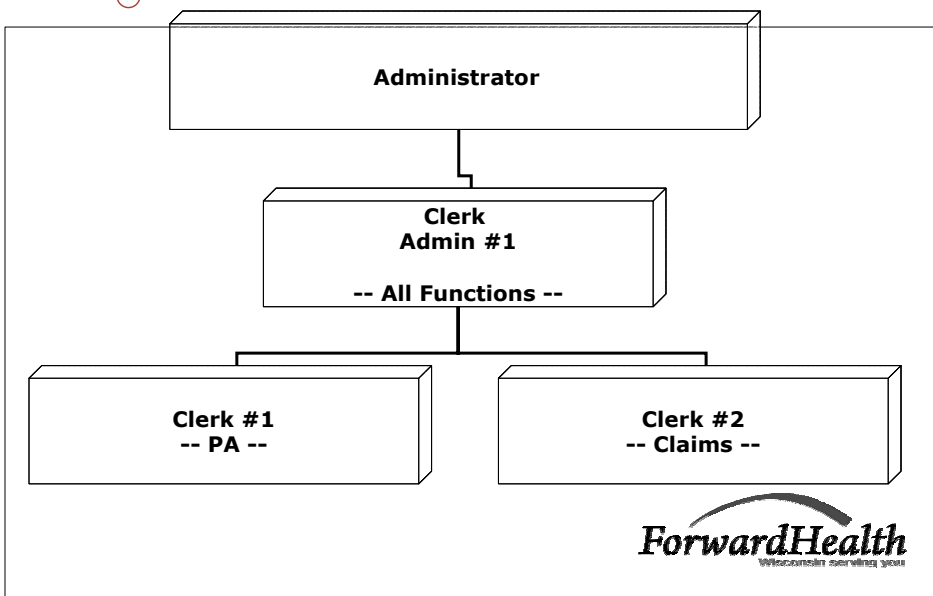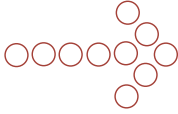
ForwardHealth
Wisconsin serving you
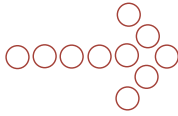
The Clerk Account

•The Administrator or Clerk Administrator may set up a Clerk Account.

•Clerks have access only to the functions that they are granted permissions to.

•Clerks do not have the ability to add/modify/remove other clerks, clerk administrators, or administrators.
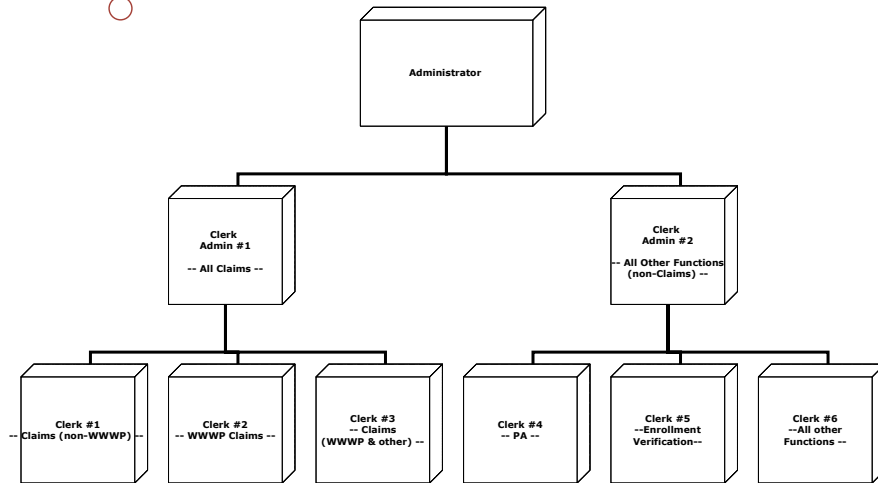
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Wisconsin serving you
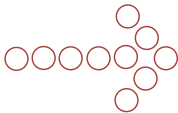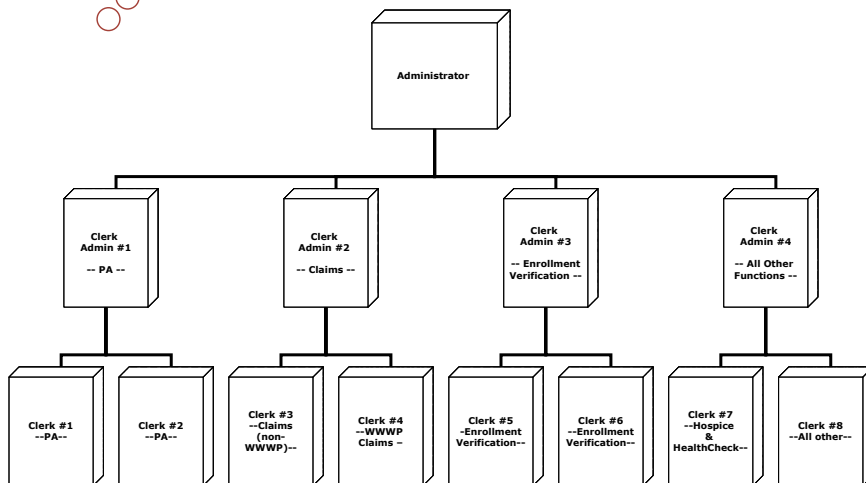
Example 1: Simple Account Set-up

| Administrator |

| Clerk
Admin #1

-- All Functions -- |

| Clerk #1
-- PA -- | Clerk #2
-- Claims -- |

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Example 2: Moderate Account Set-up

Administrator

Clerk Admin #1

-- All Claims --

Clerk Admin #2

-- All Other Functions (non-Claims) --

Clerk #1
-- Claims (non-WWWP) --

Clerk #2
-- WWWP Claims --

Clerk #3
-- Claims (WWWP & other) --

Clerk #4
-- PA --

Clerk #5
--Enrollment Verification--

Clerk #6
--All other Functions --

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Example 3: Complex Account Set-up

Administrator

Clerk Admin #1

-- PA --

Clerk Admin #2

-- Claims --

Clerk Admin #3

-- Enrollment Verification --

Clerk Admin #4

-- All Other Functions --

Clerk #1
--PA--

Clerk #2
--PA--

Clerk #3
--Claims (non-WWWP)--

Clerk #4
--WWWP Claims –

Clerk #5
-Enrollment Verification--

Clerk #6
--Enrollment Verification--

Clerk #7
--Hospice & HealthCheck--

Clerk #8
--All other--

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When Can I Start?

•Providers may begin requesting Provider Portal Accounts in August.

•Once an account has been requested, a PIN letter is mailed to the Provider address on file. We match the information you provide us in your request with our current file to ensure the security of your account and the data in it.

•More information on when and how to request a Provider Portal Account will be included in an Update.

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